



Activating a Matter

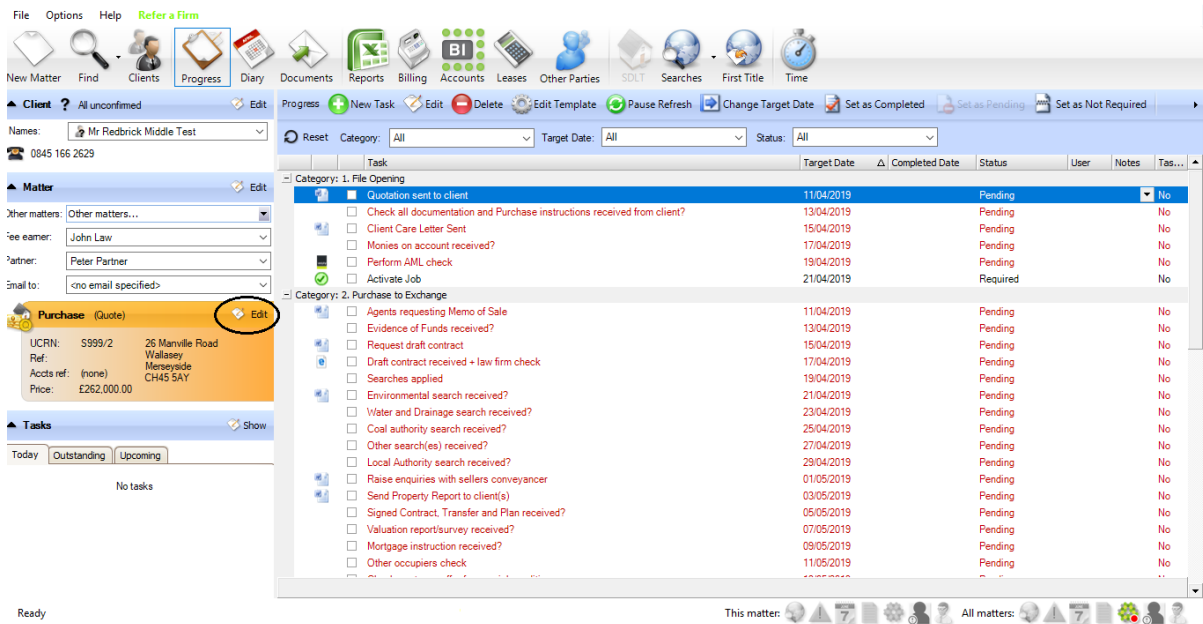


Redbrick
Practice Management

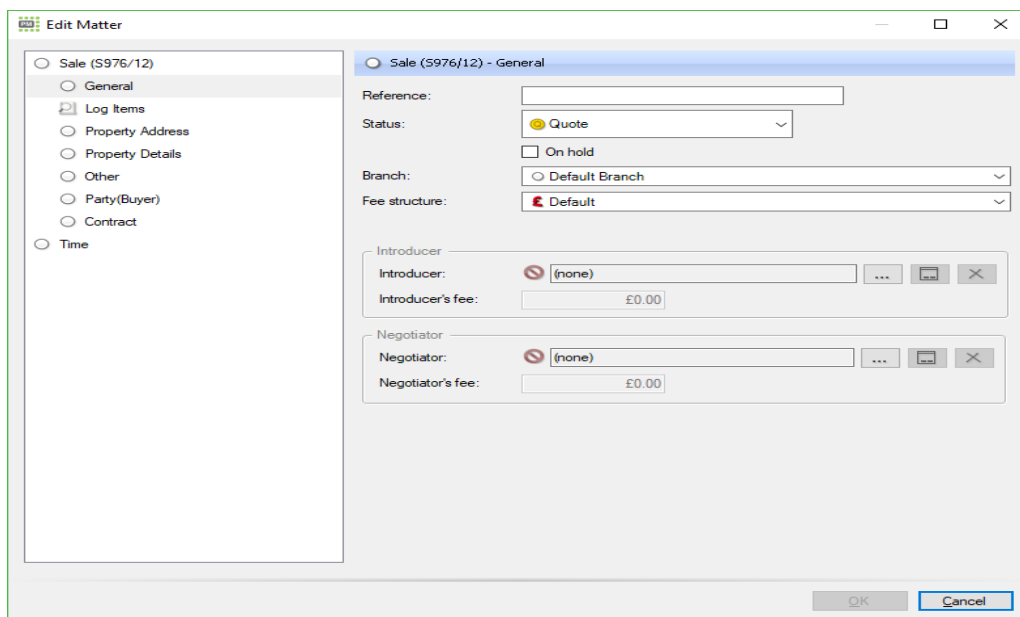
Legal Case Management

Activating a Matter

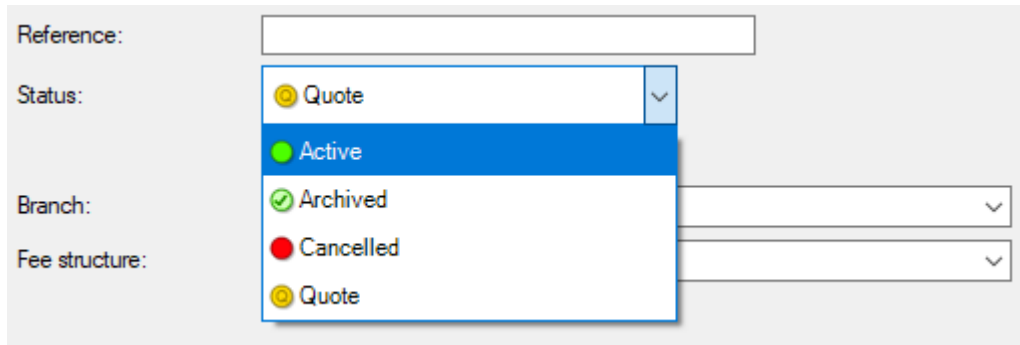
There are two ways to Activate a matter, either at the point of creation, by clicking **Save and Activate**. Or if the matter is on your system already as a quote (Prospective Client), load the matter and click the Edit Matter Button on the left of your screen.



This will open the following window.



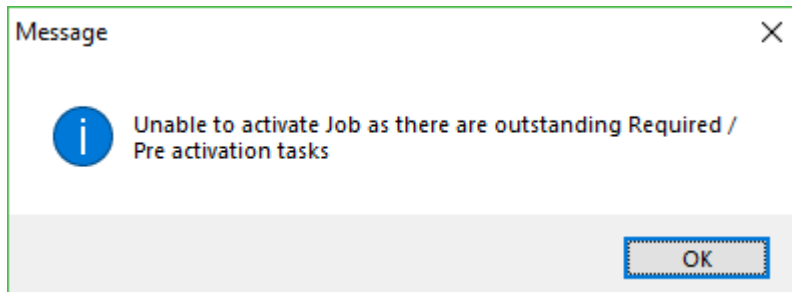
You can then change the **Status field** drop down from Quote to Active, and press OK at the bottom.

A screenshot of a software interface form. The form has several fields: "Reference:" with an empty text box; "Status:" with a dropdown menu open showing options: "Quote" (yellow circle), "Active" (green circle, highlighted in blue), "Archived" (green checkmark), "Cancelled" (red circle), and "Quote" (yellow circle); "Branch:" with a dropdown menu; and "Fee structure:" with a dropdown menu.

Your administrator may have added custom Status types in addition to those shown i.e. Exchanged or Completed.

If your system has Pre-Activation tasks setup these will need to be completed or marked as not required **before you are allowed to activate the matter.**

You will get the following message if there are incomplete Pre-Activation tasks.



You may have to cancel the activation and complete the tasks in the Progress area before coming back to activate the matter.

Pre-Activation tasks can ensure the user has checked if you have monies on account or client documentation etc, has been returned before you activate the matter.

Should you require any assistance setting up Pre-Activation tasks please speak to your Business Consultant.

Your matter view now looks like this:

S976/12 - Solicitors Law - Redbrick PM

File Options Help

New Matter Find Clients **Progress** Diary

▲ Client ? All unconfirmed Notes Edit

Names: Mr John Green

0845 166 2629 01234 456789

01572 723 655

▲ Matter Edit

Other matters: Other matters...

Fee earner: Steve Johnson

Partner: Peter Partner

Email To: <no email specified>

Sale (Active) Edit

UCRN:	S976/12	33-35 Pillings Road
Ref:		Oakham
Accts ref:	(none)	Rutland
Price:	£375,000.00	LE15 6QF

All activated matters will be invoiced in the following calendar month.

For users with Business Intelligence (BI/Accounts) software, please refer to **Activating A Matter on BI** additional User Guide.

If you have any queries on Redbrick please either contact your dedicated Business Consultant or our Support Team.



Support

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<https://www.redbricksolutions.co.uk/clientarea/login>

